### Step by Step Instruction: How to Conduct Direct Certification using File Upload: SAIS IDs

Professional Standards Learning Code 3120 Length: 1 hour



#### Revised March 2016

"How to Conduct Direct Certification using File Upload: SAIS IDs" is intended for the School Food Authorities in the state of Arizona. All regulations are specific to operating the National School Lunch Program under the direction of the Arizona

Department of Education.

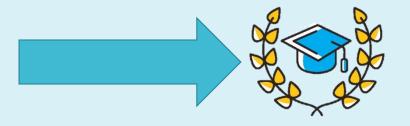
#### Objectives

The Step by Step Instructions: How to Conduct Direct Certification using File Upload SAIS IDs will:

- Provide a brief overview of the SAIS system
- Give step by step guidance for how to create, save and upload a file in the CNP Direct Certification/Direct Verification system to conduct direct certification based on student SAIS ID numbers.
- Provide guidance on how to print and/or save the direct certification match results.
- Address the most common upload error message and how to correct it when conducting Direct Certification.

### Comprehension Check

- Throughout this guide there will be comprehension quiz questions to test your knowledge and help you apply what you're learning.
- Be sure to review these quiz questions and the answers, available within the guide.
- This icon will indicate a comprehension quiz question, and the background of the slides will be a light blue like you see on this slide.



### File Upload: SAIS Format

#### The Step by Step Instruction will review:

Brief Overview of SAIS and the File Upload Process	Slides 5-9
Create the Excel Spreadsheet for SAIS IDs	Slides 10-23
Log into CNP Direct Certification	Slides 24-31
Uploading the Excel Spreadsheet for SAIS IDs	Slides 32-39
Results of DC Report	Slides 40-50
Upload Errors	Slides 51-53

The following slides will only cover how-to instructions for File Upload using SAIS IDs. Please refer back to the ADE webpage for other upload methods.

### Brief Overview of SAIS system and the File Upload Process

### Student Data: SAIS ID

#### Student Accountability Information Services ID (SAIS IDs)

- **SAIS Student ID** Arizona Department of Education assigns each student a SAIS ID that acts as a student identifier from K-12<sup>th</sup> grade.
- SAIS IDs can be utilized to conduct CNP Direct Certification only if the site annually reports SAIS data to SAIS division of Arizona Department of Education (ADE).

\*If your school does not report SAIS data to ADE, the SAIS upload option will not provide results and will show zero (o) students and matches. This will affect all search methods using SAIS IDs: State Match, File Upload using SAIS IDs and Individual Student Look Up using SAIS IDs.

ADE SAIS: <a href="http://www.azed.gov/student-accountability/">http://www.azed.gov/student-accountability/</a>

**SAIS Support Center:** 

Phone: 602-542-7378

Toll Free: 1-866-577-9636

Email: <u>ADESupport@azed.gov</u>

### File Upload: SAIS Format

#### File Upload: SAIS Format

This method is recommended to search the eligibility of a large number of students.

#### User must:

- 1. Create an excel spreadsheet and enter the SAIS ID of the students
- 2. Save the excel spreadsheet as a .CSV file
- User must upload the file into CNPDirectCertification system to run the report.

### Comprehension Check

Can you use the SAIS ID File Upload method if your school or district does not report SAIS ID information to ADE?

- A. Yes. All file upload methods are available to all districts.
- B. Yes. You can use whatever student ID numbers are assigned by your school and do a SAIS ID file upload.
- C. No. The SAIS ID file upload method only works if the school or district reports student information in the SAIS ID system.



#### Comprehension Check

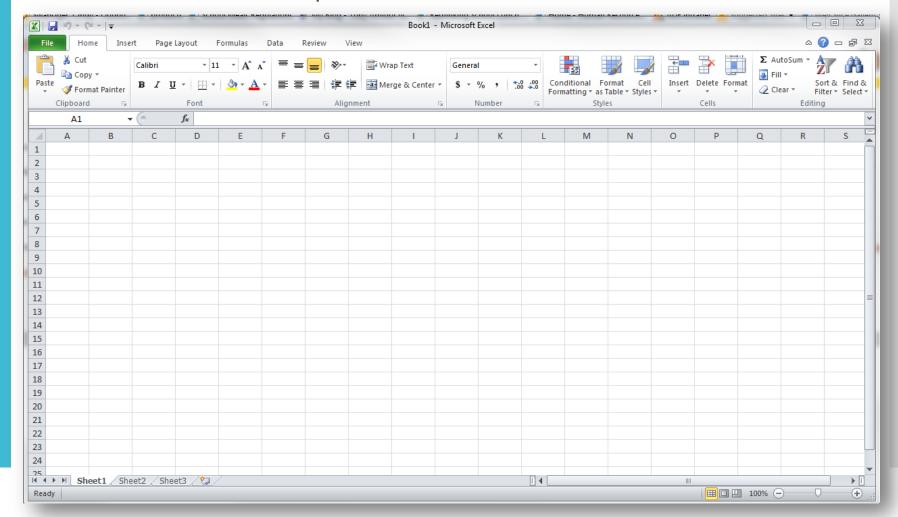
Can you use the SAIS ID File Upload method if your school or district does not report SAID ID information to ADE?

- A. Yes. All file upload methods are available to all districts.
- B. Yes. You can use whatever student ID numbers are assigned by your school and do a SAIS ID file upload.
- C. No. The SAIS ID file upload method only works if the school or district reports student information in the SAIS ID system.

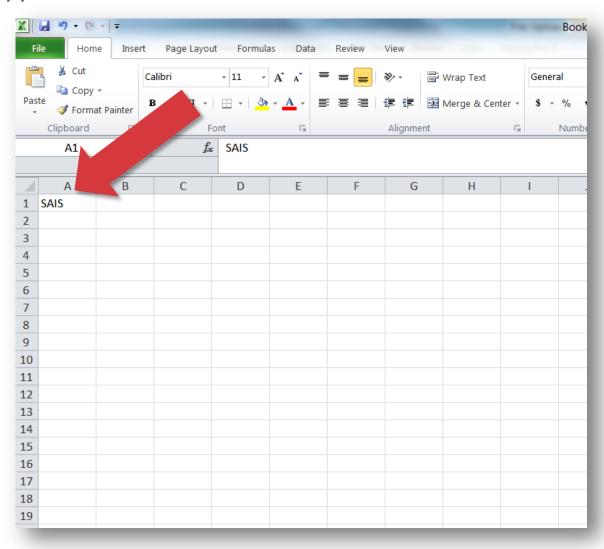
If your school or district does not report to SAIS, this file upload method will not work and you will receive o match results. You can still use the standard and social security number file upload methods. Refer to the other Step by Step guides for these methods for guidance on how to conduct direct certification using these other methods.



1. Open the Excel application on your computer. Your screen should have a blank spreadsheet.



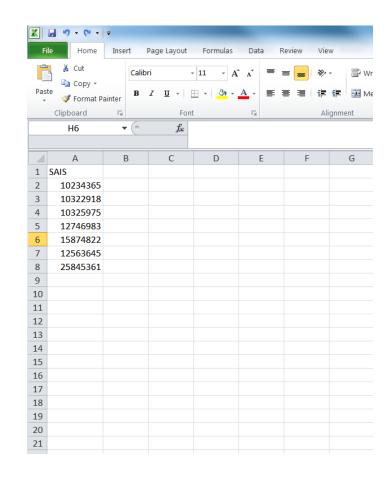
2. Type the word "SAIS" entered into cell A1.



3. Starting on row 2, type the first SAIS ID. Each row after must contain a single SAIS ID number. User may enter unlimited amount of SAIS entries.

\*Note: SAIS IDs are 8 digits.





### Comprehension Check

True or False: You can enter more than 1 SAIS number in each cell.

- A. True. You can enter all SAIS numbers in the first cell.
- B. True. Formatting does not matter when creating this file.
- C. False. Only 1 number should go in each cell, and they should all be in column A.



### Comprehension Check

True or False: You can enter more than 1 SAIS number in each cell.

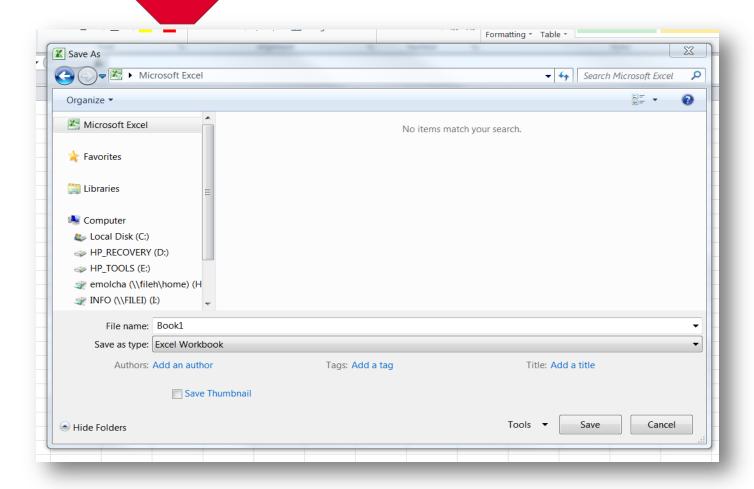
- A. True. You can enter all SAIS numbers in the first cell.
- B. True. Formatting does not matter when creating this file.
- C. False. Only 1 number should go in each cell, and they should all be in column A.

The CNP Direct Certification system only accepts files that are formatted in a very specific way, as outlined in this training.

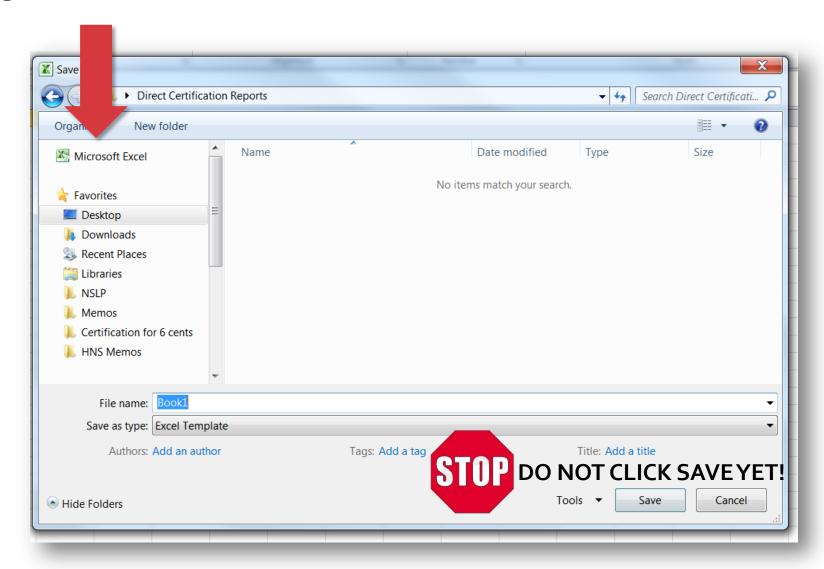


4. When all SAIS IDs have been entered, click "File" and choose the option "Save As". A small window should appear.

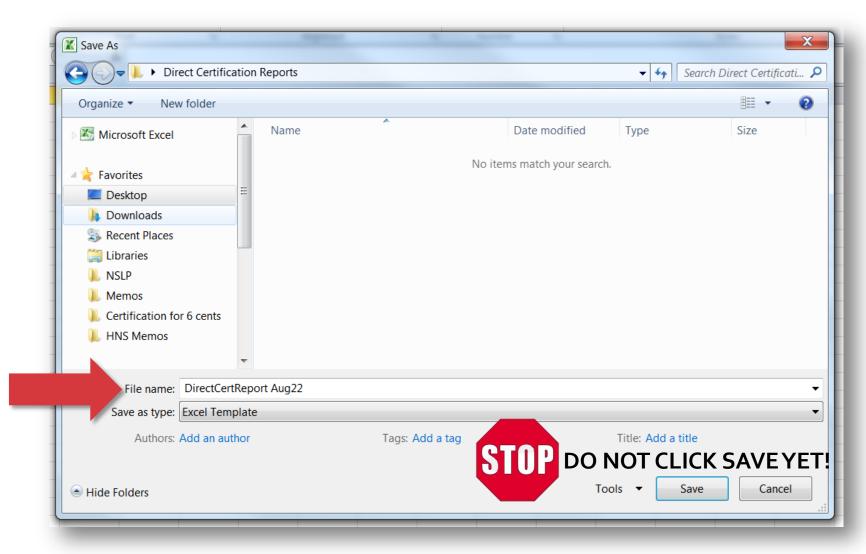
STIP DO NOT CLICK SAVEYET!



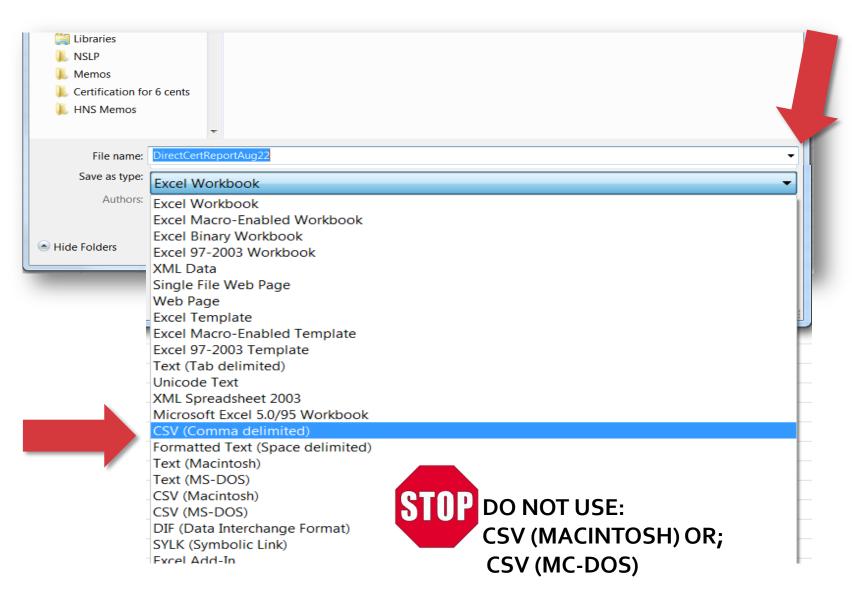
5. Select the location where to save the file.



6. In the field "File Name", name file. As best practice, user may wish to include date in file name.



7. In the field "Save as type", use the drop down to select CSV (Comma delimited).



#### Comprehension Check

What format should be selected when you save the file?

- A. Excel workbook
- B. Excel template
- C. CSV (Comma Delimited)



### Comprehension Check

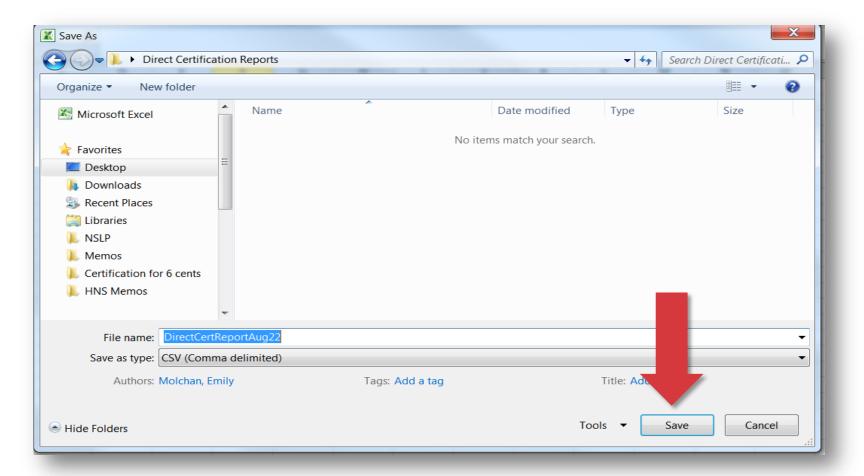
What format should be selected when you save the file?

- A. Excel workbook
- B. Excel template
- C. CSV (Comma Delimited)

The File Upload method only works if the file is saved as a CSV (Comma Delimited) file. The search will not process in the system unless you save as this file type, so be sure you save the file in the correct format.

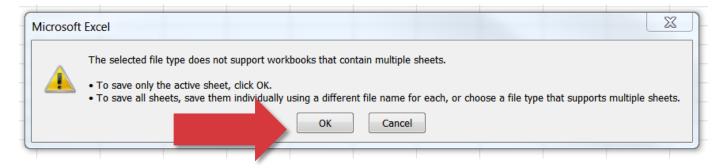


#### 8. Click "Save"



Depending on the version of Excel being used, the following windows may pop up after clicking "Save".

Click "OK" to confirm saving the file.



Click "Yes" to confirm saving the file.



#### 9. Go to the ADE health and Nutrition Webpage: <a href="http://www.azed.gov/health-nutrition/">http://www.azed.gov/health-nutrition/</a>



10. Locate "Common Logon" on the upper right of the webpage. Click on the Common Logon link.



#### A new webpage will load. It should look like this screen.

ARIZONA DEPARTMENT  OF EDUCATION	OMMON LOGON
The gateway to secure data transactions and information	
Username:	
Password: Continue >>	
Please note that our web pages have new functionality which will log you out and take you back to this page if your session remains idle for too long a period of time.	
We have changed our practices regarding passwords and user accounts. <u>Click here</u> for Current Password Process.	
If you have lost your password <u>Click here</u> .	
• To launch an application the user must have a valid username and password and must agree that, by using that username and password, they will abide by the ADE Acceptable Use Policy.	
• Any questions related to Common Logon account, please contact the ADE Support Center at (602) 542-7378 if you are in the Phoenix area. Outside the Phoenix area (866) 577-9636 or E-mail enterprise@ade.az.qov. Or Click here for more information.	
Check the MIS Bulletin Board for the latest news and information.	

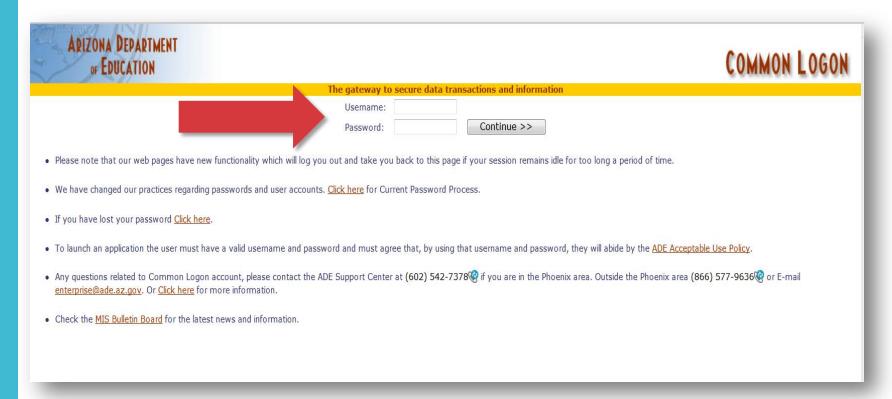


You must have a user name and password in order to access Common Logon.

At <a href="http://www.azed.gov/health-nutrition/nslp/program-forms/">http://www.azed.gov/health-nutrition/nslp/program-forms/</a>

- 1. Read the Online Training Manual
- Complete the Requesting Common Logon Permissions for NSLP/Direct Certification, requesting Direct Certification permissions, and send to ADE.
- 3. Receive Common logon username and password in 7-10 days

#### 11. Enter your Username and Password.



### Once logging in, your webpage will show all Common Logon Applications you have access to.

The gateway to secure data transactions and information

Common Logon Application Menu

- CNP Direct Certification / Direct Verification
- CNP Verification
- CNPWeb
- LEA Profile

Change Profile Logout



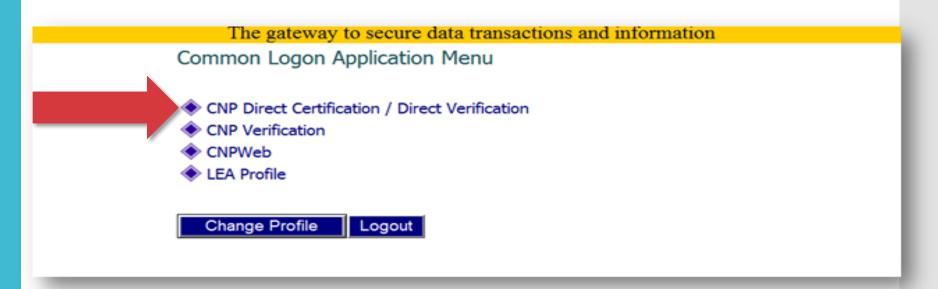
You must have access CNP Direct Certification/Direct Verification. This is an <u>additional</u> option on the Common Logon Permissions form.

\*If you already have a user name and password, but do not see the CNP Direct Certification/ Direct Verification option:

At <a href="http://www.azed.gov/health-nutrition/nslp/program-forms/">http://www.azed.gov/health-nutrition/nslp/program-forms/</a>

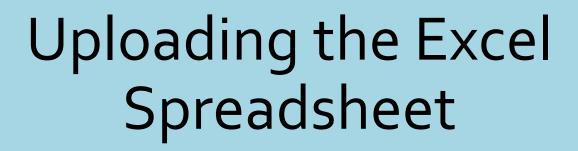
- L. Complete the Requesting Common Logon Permissions for NSLP/Direct Certification to <u>ADD</u> the Direct Certification permission. Send to ADE.
- Receive CNP Direct Certification/ Direct Verification access in 7-10 days.

12. Click on CNP Direct Certification/Direct Verification

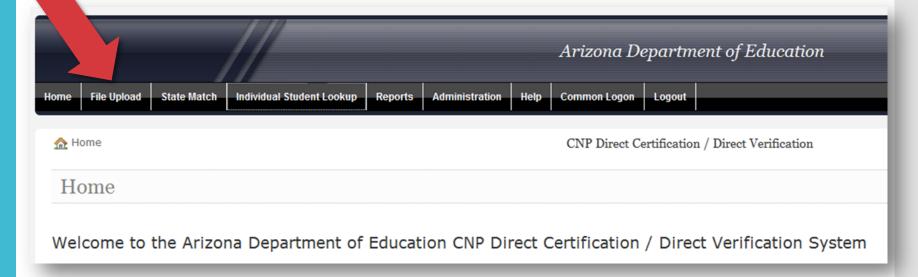


A new screen will load. It should look like this.

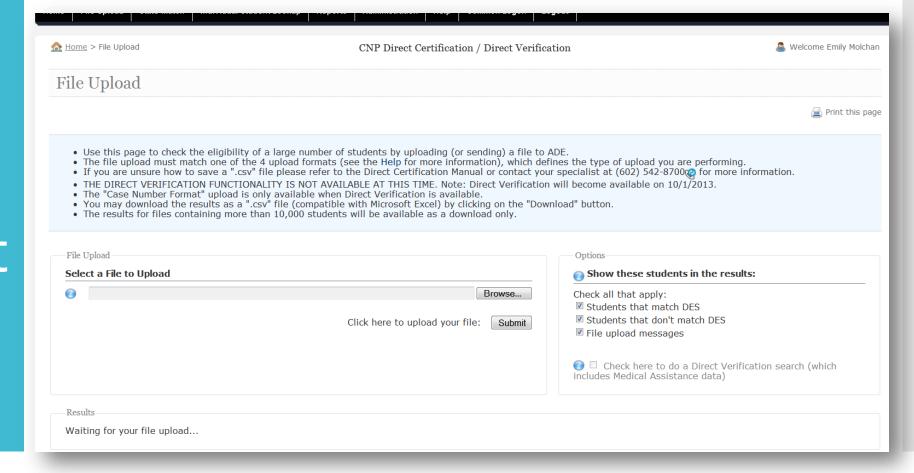




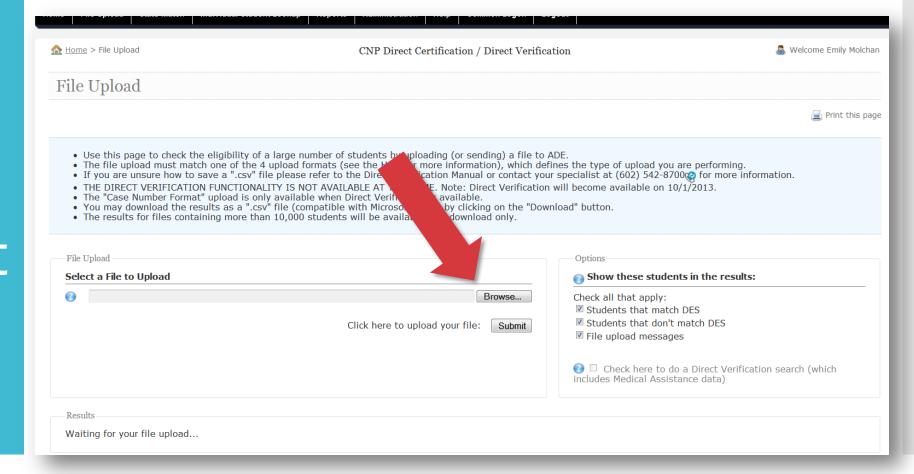
13. Click on the option in "File Upload" found at the top of the webpage. should look like this.



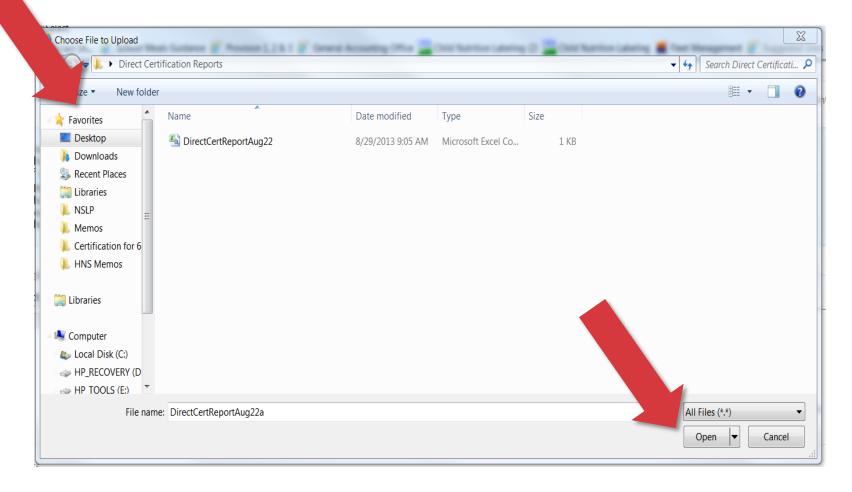
Once you have selected "File Upload", the webpage should look like this:



14. Click on the "Browse" button to upload the excel file created above.

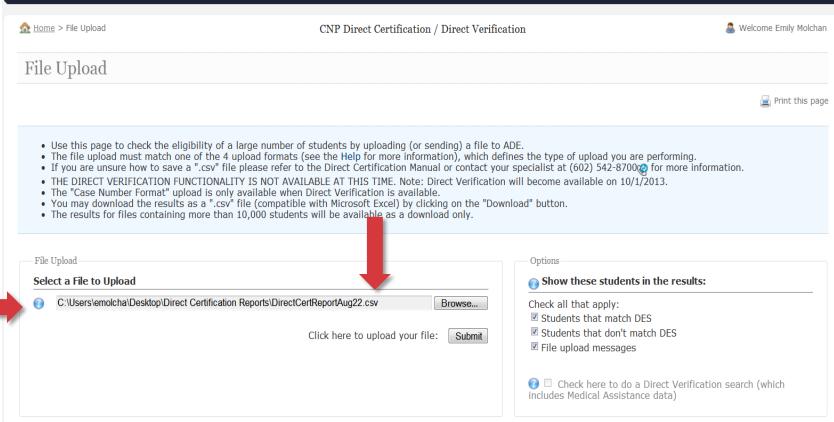


15. By clicking "Browse" a window will come up that looks like this. Find where you saved the excel file. Click "Open".



# Uploading the Excel Spreadsheet

#### The field below should be filled with the file.



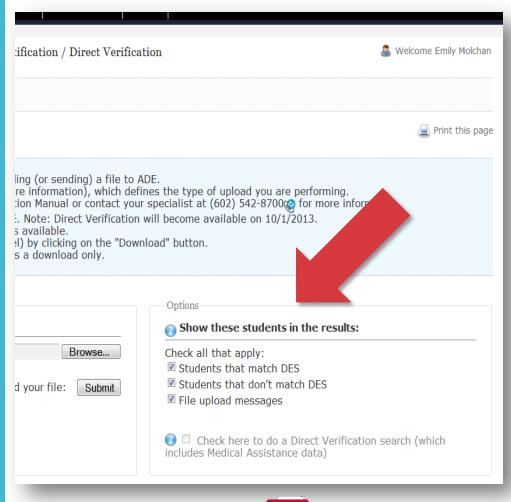


The file MUST be a CSV file. Check the end of your file name in the field. It must have a ".csv".

If it is a ".xls", the report will not run.

## Uploading the Excel Spreadsheet

#### 16. Choose how you want to view your results.



- By choosing only "Students that match DES" the report will show matches.
- By choosing only "Students that don't match DES" the report will show no matches.
- By choosing both boxes, the report will provide matches and no-matches.
- By choosing "File upload messages", the report will provide error messages associated with upload.

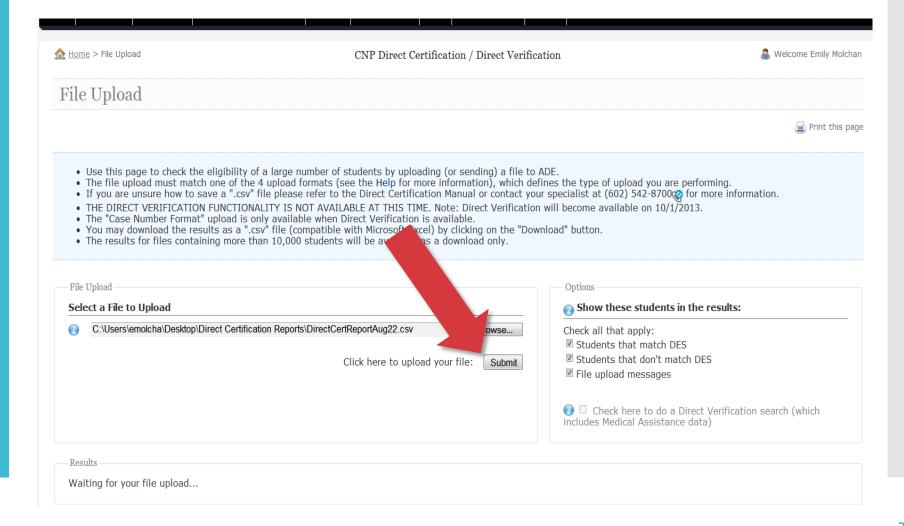
You may choose all three boxes.



Do not select the "Check here to do a Direct Verification search" when running a Direct Certification report. This option is ONLY to be use during Verification activities.

# Uploading the Excel Spreadsheet

#### 17. Click "Submit" to run the report.



### Results of CNP Direct Certification

# Changes to: Results of CNP Direct Certification view effective May 2014

ADE's CNP Direct Certification/Direct Verification system has been updated. Specifically, the match results now include additional data columns with program participation information. These new columns have been added to ensure LEAs can accurately report student eligibility information when it is required for the CNP Verification Summary Report.

The new columns are SNAP, TANF, MA, and Foster. The DES Results column (Match or No Match) is still displayed. **LEAs must continue to utilize the DES Results column to determine if a student is Directly Certified**. Please note, students participating in more than one program will only be counted once in the total "Matches Found" section of the Results box. Please visit our website <a href="https://www.azed.gov/health-nutrition/nslp/programguidance/">www.azed.gov/health-nutrition/nslp/programguidance/</a> to view Step-by-step Instruction for using the CNP Direct Certification system.

### File Upload Results

#### Your results page will look like this for the SAIS ID Format:

Processed as:	Standard									l l
Prepared by:	Mia Calamia	Date Prepare	d:	5/28/2014 8:03 /	Click here to download your results:					
Direct Verification:	No	Displaying:		Matches , Non-Matches						
Records Processed:	8	Validation Err	ors Found:	0						
Matches Found:	0	Non-Matches	Found:	8						
SNAP Matches:	0	MA Matches:		0						
TANF Matches:	<b>0</b> Foster Matches:		s:	0						
Record Number A	First Name	Last Name	Birthdate	DES Results	DES Decision Date	SNAP	TANF	MA	FOSTER	Upload Message
	1 carson	millers	12/02/1991	No Match						
	2 Jessica	Aldroff	10/29/2001	No Match						
	3 Faith	Harlton	08/23/2003	No Match						
				No Match						
	4 Tyran	Boss	06/19/2004	NO Match						
	4 Tyran 5 Loki	Boss Dexter	06/19/2004 04/30/1998	No Match						
	5 Loki	Dexter	04/30/1998	No Match						



#### File Upload Results

You must keep this report for your records.

- #1. Print report directly from webpage, OR
- #2. Download the report to save on your computer to access at any time.





The CNPWeb Direct Certification application does NOT save your full report. The webpage only records a report has been run. Once user closes out of window, user must re-upload the file to get the results.

### Comprehension Check

True or False: Once you see the results, you are done with Direct Certification.

- A. True.
- B. False. You have to email ADE to let them know you did Direct Certification. Once you do that, you are done.
- C. False. You must save or print your report and keep them on file. Once you have saved and/or printed the results, you are done conducting Direct Certification



#### Comprehension Check

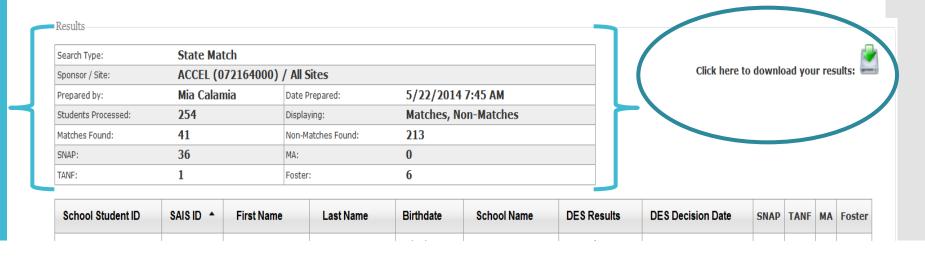
True or False: Once you see the results on the screen, you are done with Direct Certification.

- A. True.
- B. False. You have to email ADE to let them know you did Direct Certification. Once you do that, you are done.
- C. False. You must save or print your report and keep them on file. Once you have saved and/or printed the results, you are done conducting Direct Certification.

All LEAs must keep these results on file. They can be saved electronically, printed out, or you can do both. The key is that you must be able to access the results at any time.

#### Q1. Do I need to download my results or can I just print the webpage?

Whichever method works better for the user. Upon request, the SFA must provide a copy of the original report and the date it was collected. Please note: when downloaded, the top summary bar (including date report was run) is not included. ADE recommends noting the date within the file.

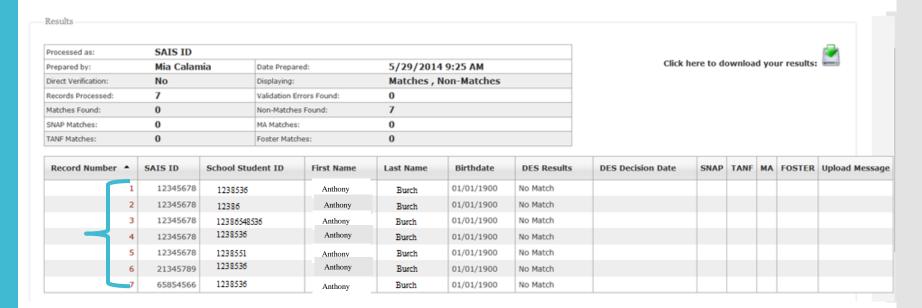


### Q2. Would ADE accept my Direct Certification report if I copied the results of "Match and No Match" information onto an excel spreadsheet?

ADE will ask to see the original report created from the search. The SFA must keep the <u>original search results format</u> from the webpage or downloaded results. As long as the SFA has at least one copy in its original form, the SFA can copy the results into their own format.

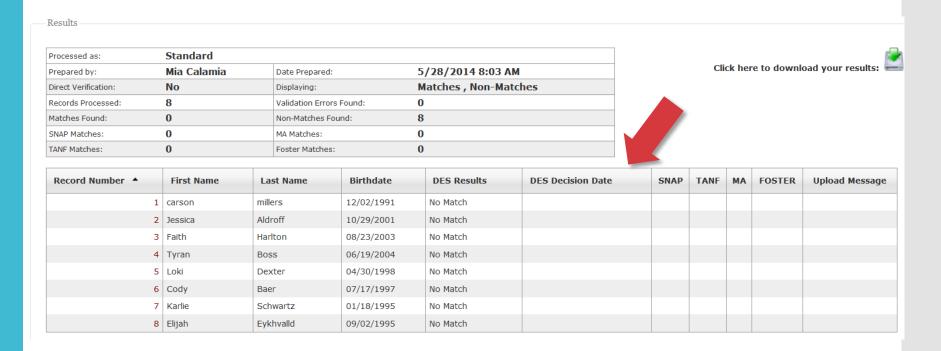
#### Q3. Why is the student showing up more than once?

The may have been given multiple School Student IDs (i.e. transferred schools). The database will list ALL School Student IDs given to that student who has is only granted one SAIS ID. However, the DES result will be the same for all different School Student IDs.



#### Q4. On my results page, is it ok if the column "Decision Date" is blank?

Yes, it is ok if the column Decision Date is blank on the results report.



Q5. On my results page, if there is a "Decision Date" next to the student, do their FREE meal benefits start at that date?

No, the student is directly certified and begins receiving free meal benefits the date the report was run and the first time they are "Matched" within the program year.

Results ————					
Processed as:	Standard				
Prepared by:	Mia Calamia	Date Prep	ared:	5/22/2014 8:10 AM	
Direct Verification:	No	Displaying	:	Matches , Non-Matches	
Records Processed:	1	Validation	Errors Found:	0	
Matches Found:	0	Non-Match	nes Found:	1	
SNAP Matches:	0	MA Matche	es:	0	
TANF Matches:	0	Foster Mat	tches:	0	
Record Number A	First Name	Last Name	Birthdate	DES Results DES	Decision Date
1	Lauren	Bower	09/20/2004	No Match	

### **Upload Errors**

### Upload Error Messages

#### Invalid File Format value detected

- Results					
File Upload Processed as:	Invalid File Format value detected				
Prepared by:	Mia Calamia	Date Prepared:	5/22/2014 8:13 AM		
Direct Verification:	No	Displaying:	Matches, Non-Matches, Messages		
Records Processed:	0	Validation Errors Found:	0		
Matches Found:	0	Non-Matches Found:	0		
SNAP:	0	MA:	0		
TANF:	0	Foster:	0		

Click here to download your results:



#### File Upload Status

- Uploading your file...
- · Your file was uploaded successfully.
- The file name is: SNA Application 20140512.pdf.
- The file size is: 131,617 bytes.
- The file took 00:00:00.002 (hours : minutes : seconds.tenths of a second) to upload.

#### File Processing Status

- Processing your file...
- Your file has been processed.
- The file took 00:00:00.013 (hours : minutes : seconds.tenths of a second) to process.
- One or more errors were encountered while processing your file. Any error information is displayed above.

#### If you receive this error:

Ensure the file you have uploaded has the word "SAIS" is typed in the first row, first column (cell A1)

#### Technical Assistance

If you have any questions on the eligibility when certifying children with Direct Certification, use:

The Eligibility Manual for School Meals found at:

http://www.azed.gov/health-nutrition/nslp/manuals/

For other Direct Certification upload methods, refer back to the ADE webpage

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